

# Identify And Manage Multiple Accounts For A Consumer (“Linking”) – Quick Reference Guide

## To setup account linking:

*System control 1 > Account linking parameters > Account linking parameters*

- Select account information to “match” for accounts to link
- Choose to change collector if an account is linked
- Apply a Smart code if account is successfully or unsuccessfully linked

## To change/close primary account:

*System control 1 > Account linking parameters > Close codes for changing primary accounts*

- Apply Smart code to close a primary account
- Flag to omit legal accounts to close
- Flag to omit pre-legal accounts to close
- Copy Notes from account being closed to new primary account

## To setup up linking for a client:

*Management Menu > Client Update – Page 3 Link Code*

- Add link code to a client master
- Stop linking for a client

## To define collector rules for when accounts automatically link:

*Management Menu > Collector Update*

- Defines owner of account once it is linked

## To manually link accounts:

*Daily Operations Menu > Account linking*

- Based on the setup at the collector level – a user can link account manually, when they failed to meet the point criteria for automated linking

## To manually link accounts from the account detail screen:

*Account inquiry > Account detail screen > F5- Linked Accounts*

- View linked accounts
- Change primary account
- Move Notes to a different account
- Press **F9** to link accounts

## To distribute payments across linked accounts:

*Payment Transaction menu > Debtor/Agency Payment Transaction Entry - Balance code*

- Specify which balance type payment should be applied to

## To manage linked accounts information across accounts:

*Account detail screen > Tab-+*

- Manage phone numbers, and addresses
- Stopping calls from the primary account

## To manage letters for linked accounts:

- *System Control 1 > Letter Codes – Page 1 -Print link balances (Y,1-9)*
- *System Control 1 > Letter Codes – Page 2 – Bypass option for linked balance based on placement date*
- *System Control 1 > Letter Codes – Page 2 – F7*